

E-Mail ALPERSRU V/03

Subj: ANNUAL VERIFICATION OF BAH, DEPENDENCY AND EMERGENCY DATA

- Ref** (a) [Personnel and Pay Procedures Manual, PSCINST M1000.2\(series\)](#)
(b) [PSCNOTE 5000, BAH, Dependency and Emergency Data Forms and Reports](#)
(c) [Coast Guard Pay Manual, COMDTINST M7220.29\(series\)](#)
(d) [Coast Guard Personnel Manual, COMDTINST M1000.6\(series\)](#)
-

Introduction This E-Mail ALPERSRU announces changes to the process, described in Section 5-C-2 of reference (a), for the annual verification of BAH, dependency and emergency data.

Background Reference (b) published new forms and procedures for recording a member's BAH eligible family members and designation of beneficiaries. Designation of beneficiaries for the *Death Gratuity, Unpaid Pay and Allowances* or *Person to Receive an Allotment of Pay if Missing or Unable to Transmit Funds* will now be recorded on CG PSC-2020D, Designation of Beneficiaries form. It is no longer necessary to enter such designations in PeopleSoft.

Validation Process This is how verification of dependency and emergency data will be accomplished using the new BAH/Dependency form and Emergency Contact report.

Stage	Who does it/ When	What Happens
1	SPO/PERSRU Week of 03-07 Nov	Forwards to units: <ol style="list-style-type: none">1. PeopleSoft BAH/Dependency Forms2. PeopleSoft Emergency Contact Information Report3. Copies of members' SGLI Election forms (SGLV-8286 & 8286A) Note: If the unit has sufficient administrative capability and maintains Unit PDR copies of SGLI forms, this step is unnecessary as the unit can generate the BAH/Dependency Forms and Emergency Contact Information Reports from PeopleSoft using Command Self-Service access.

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**Validation
Process (cont'd)**

Stage	Who does it/When	What Happens	
2 Cont'd	Unit/ Upon Receipt	Forwards SGLI Forms, BAH/Dependency Forms and Emergency Contact Reports to members for verification. Also provides members with blank, or with instructions to access, CG PSC-2020D, Beneficiary Designations form.	
		If a form or report is not received for a member or is lost or destroyed.	Then 1. Use the PeopleSoft BAH/Dependency Form or Emergency Contacts Report print procedure to generate a new form/report for the member's verification. 2. Provide the member a blank SGLI election form to complete.
3	Member NLT 30 Nov	<ol style="list-style-type: none"> 1. Completes CG PSC-2020D, Beneficiary Designation form. Forwards original to SPO/PERSRU, retains copy for Unit PDR if one is maintained. 2. Reviews BAH/Dependency Data form for accuracy: <ul style="list-style-type: none"> • Annotates any necessary changes or corrections. • Signs and dates in the "Members Certification" area. • Returns to SPO/PERSRU, includes CG PSC-2020, BAH Dependency Worksheet, and supporting documentation if adding/removing BAH eligible dependents. 3. Reviews Emergency Contacts Report for Accuracy: <ul style="list-style-type: none"> • Enters any changes or corrections in PeopleSoft using self-service. Or, if unable to access the system, annotates changes on report and returns to SPO/PERSRU data entry. 	

Continued on next page

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Validation Process (cont'd)

Stage	Who does it/When	What Happens
4	SPO/PERSRU	<p>Enters, into PeopleSoft, any changes or corrections the member noted using the appropriate process:</p> <ul style="list-style-type: none">• Dependent/Beneficiary to add or change information about dependents (Note: Appropriate SDA II entries must be completed if dependency change impacts entitlements). Generates a new BAH/Dependency form and forwards to member for signature.• Emergency Contact to add or change emergency contact information• Life and AD/D Benefits to make SGLI election changes (Note: Data entry is only required when member is changing a SGLI/Family SGLI election, i.e. increasing, decreasing or declining coverage. No data entry is required if the member is only updating beneficiary designations.) <p>Files SGLI forms, BAH/Dependency forms and CG PSC-2020D forms in section 4 of PERSRU PDR.</p>

Procedures

Procedures for maintaining dependency and emergency data and printing forms and reports in PeopleSoft are available in the online help at:

<http://www.uscg.mil/hq/psc/ps/>

An extract of the portions of the online help pertaining to dependency and emergency data is included as enclosure (1).

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**Failure to
Complete
Annual
Validation**

Per Section 3.B.7.b of reference (c), if a member fails to perform the annual dependency certification, the member loses entitlement to Basic Allowance for Housing (BAH) at the With Dependents rate, and shall be paid BAH at the Without Dependent rate until such time as the member provides proper validation. If a member fails to perform the annual validation, the PERSRU shall notify PSC (MAS) via E-Mail to HRSIC-MAS@hrrsic.uscg.mil not later than 31 December 2003.

**Certification
Requirements
for Single
Member
Sponsors and
Military
Couples With
Dependents**

Reference (d), Article 4.A.6.g. requires single members with dependents, and military couples with dependents, must also make the following certification on their BAH/Dependency form annually:

"I certify that I am in compliance with Article 4-A-6.g., Coast Guard Personnel Manual. I have made adequate, proper dependent care arrangements and am available for unrestricted worldwide duty."

This certification shall be made in the member's certification area of the form.

**Update of
DEERS
Database**

If the member reports a dependency change during review of the BAH/Dependency form, this dependency change shall be reported, as appropriate, in the DEERS database. Additionally, if the member reports a change in residence address, this change in address should be recorded in DEERS as prescribed on pages 5-B-17 and 5-B-18, reference (a).

Questions

Questions regarding the content of this e-Mail ALPERSRU may be directed to PSC Customer Care at (785) 339-2200, or via [e-mail](#).

Released by

Internet release authorized.

/s/
M. P. SULLIVAN
Deputy Director

Encl: (1) Dependency and Emergency Data Procedures

Dependency and Emergency Data

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Dependency/Emergency Data Activity Guide

Introduction

This section provides the procedures for using the Dependency/Emergency Data Activity Guide to access family information, marital status, SGLI elections, dependency forms, and emergency contact forms.

The Activity Guide simplifies navigation by grouping separate tasks into one area.

Procedure

Start Internet Explorer, sign into PeopleSoft and follow these steps to access the Activity Guide.

Step	Action
1	Select menu items in the following order (note, see the Basic Navigation topic for help on using menus): Administer Workforce > Administer Workforce (GBL) > Use Dependency/Emergency Data
2	The Dependency/Emergency Data Activity Guide will display. Select the link for the task you want to complete. The link will open a new window, the activity guide will remain open so you can return and select another task without having to navigate the menus again.


The Dependency/Emergency Data Activity Guide:



Add, Remove or Update Family Information

Introduction

This process is used to add/or change the status of (BAH) *Basic Allowance for Housing* Eligible Family members. Family members are not deleted from the member's record when their status changes. For example, if a member reports a divorce, you would change the spouse's relationship to "ExSpouse" and de-select the BAH Eligible box on Personal Profile page.

 **Note:** If recording a marriage, divorce or death of a spouse, be sure to update the member's marital status on the Personal Data page.

After the data is entered and saved it can be printed on a BAH/Dependency Form. See [BAH Dependency Form Print Procedure](#) for more information.

Reference

Before adding a BAH Eligible Family Member you should consult Chapter 3-F of the [Coast Guard Pay Manual, COMDTINST M7220.29\(series\)](#).



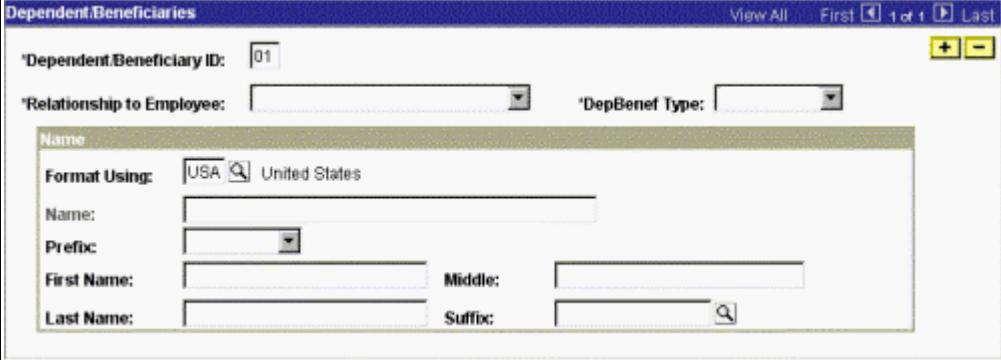

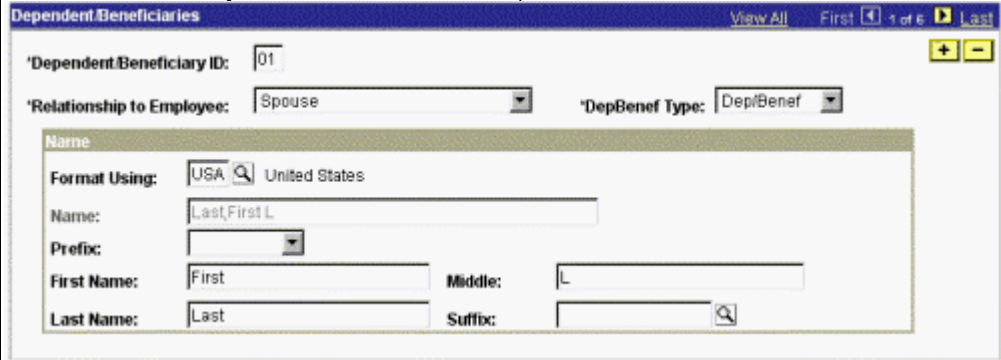
Pages and Tabs

Processing family member/beneficiary information consist of one page and three tabs.



1. The **Name** tab enables you to record the family member or beneficiary name and relationship to the member. You must use the Name tab to add or delete dependent/beneficiary records.
2. The **Address** tab enables you to record the family member or beneficiary address information.
3. The **Personal Profile** tab enables you to record BAH eligibility, birth date and other personal information about the family member or beneficiary.

Procedure

Step	Action
1	Click the Add, Remove, Update Family Information link on the Dependency Emergency Data Activity Guide.
2	<p>A search page will appear. Enter the member's employee ID number or other search criteria (see Employee ID Search Tips) and click the  button to select the member you wish to display.</p> <p> When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or national ID before making any changes.</p>
3	<p>The Dependent/Beneficiary Name tab <i>(The Name tab enables you to record the family member name and relationship to the member)</i> will be displayed.</p> <p>If the member does not have any family members or beneficiaries in the system, the Name tab will open with a new blank row, as shown below.</p>  <p>If you are adding a new family member, you may complete the fields as indicated below.</p> <p> Note: If adding a spouse, be sure to update the member's marital status on the Personal Data page.</p> <p>If the member already has family members or beneficiaries in the system, the Name tab will display the information on Dependent/Beneficiary ID 01 (the first family member/beneficiary in the member's record).</p> 

Step

Action

3

1.

If the member has more than one family member or beneficiary in the system, the links at the top of the window will be active.

View All


First

1 of 6

Last


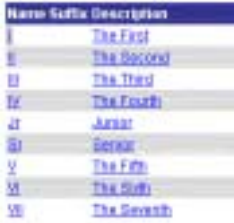

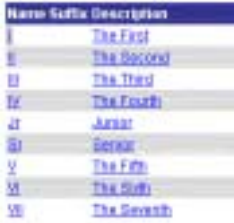

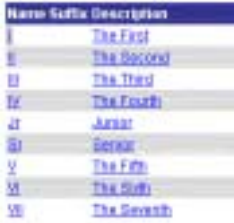
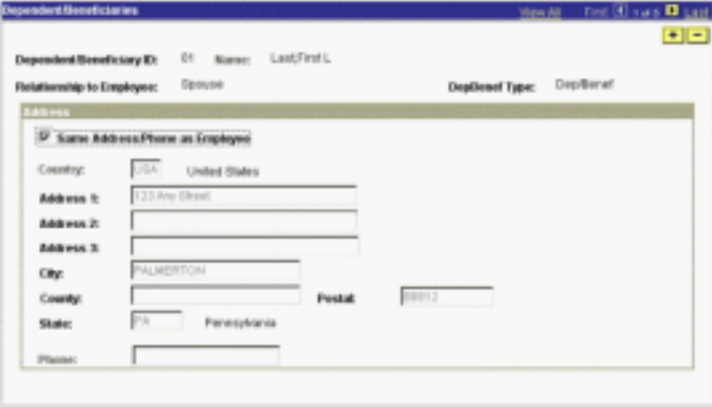
Click on the View All link, Next Arrow button, or the Last link to view additional family members.






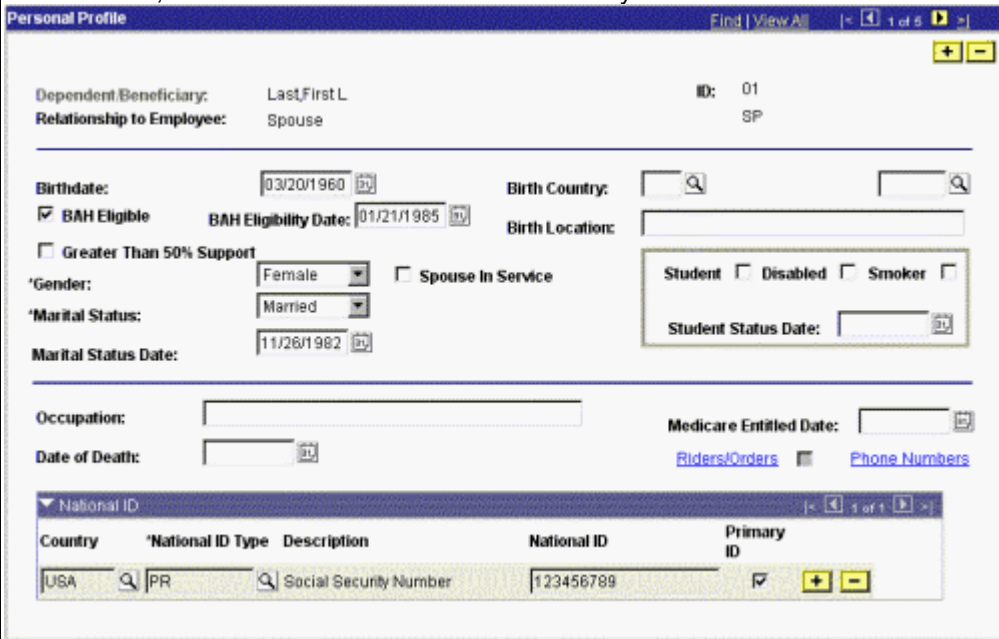
2.

Click the  to add an additional family member, a new blank row will be inserted.

Name Tab Data Entry:



Field	Description/Instructions																																	
Dependent/ Beneficiary ID	PeopleSoft pre-populates this field. It will automatically increment it by 1 for every new record added.																																	
Relationship to Employee	<div>Select a relationship from the drop-down menu. There are several pre-defined values to choose from:</div> <table> <tr> <td>Adopt Daughter</td> <td>Grandchild</td> <td>Niece</td> </tr> <tr> <td>Adopt Son</td> <td>Grandfather</td> <td>Other</td> </tr> <tr> <td>Aunt</td> <td>Grandmother</td> <td>Other Relative</td> </tr> <tr> <td>Brother</td> <td>In Loco Parentis</td> <td>Roommate</td> </tr> <tr> <td>Daughter</td> <td>Legal Guardian</td> <td>Sister</td> </tr> <tr> <td>Employee</td> <td>Legal Ward Daughter</td> <td>Son</td> </tr> <tr> <td>ExSpouse</td> <td>Legal Ward Son</td> <td>Spouse</td> </tr> <tr> <td>Father</td> <td>Mother</td> <td>Step Parent</td> </tr> <tr> <td>Father-in-Law</td> <td>Mother-in-Law</td> <td>Stepchild</td> </tr> <tr> <td>Former Spouse</td> <td>Neighbor</td> <td>Trustee</td> </tr> <tr> <td>Friend</td> <td>Nephew</td> <td>Uncle</td> </tr> </table>	Adopt Daughter	Grandchild	Niece	Adopt Son	Grandfather	Other	Aunt	Grandmother	Other Relative	Brother	In Loco Parentis	Roommate	Daughter	Legal Guardian	Sister	Employee	Legal Ward Daughter	Son	ExSpouse	Legal Ward Son	Spouse	Father	Mother	Step Parent	Father-in-Law	Mother-in-Law	Stepchild	Former Spouse	Neighbor	Trustee	Friend	Nephew	Uncle
Adopt Daughter	Grandchild	Niece																																
Adopt Son	Grandfather	Other																																
Aunt	Grandmother	Other Relative																																
Brother	In Loco Parentis	Roommate																																
Daughter	Legal Guardian	Sister																																
Employee	Legal Ward Daughter	Son																																
ExSpouse	Legal Ward Son	Spouse																																
Father	Mother	Step Parent																																
Father-in-Law	Mother-in-Law	Stepchild																																
Former Spouse	Neighbor	Trustee																																
Friend	Nephew	Uncle																																
Dependent/Benf Type	<div>This field will automatically be filled in based on the type of relationship you selected above. You can change it if necessary, select a dependent/beneficiary type from the drop-down menu. Use:</div> <ul style="list-style-type: none"> Benf -- if this person is being added solely as a beneficiary (SGLI, Death Gratuity, etc) and not as a dependent/family member for BAH purposes. Dependent/Benf -- if this person is being added as a BAH eligible dependent/family member (Including spouses in member-to-member marriages). This type (DependentBenf) will also allow you to use list the person as a beneficiary for other programs. 																																	
Name	This field will be populated by PeopleSoft after you fill out the other name fields and save the page. It displays the Last Name, First Name, and Middle Initial or complete middle name of the family member/beneficiary.																																	
Prefix	Optional. You may choose a prefix (Mr. Mrs, etc.) from the drop-down menu or leave this field blank.																																	
First Name	Enter the person's first name																																	

Step	Action						
3	<table> <tr> <td>Last Name</td><td>Enter the person's last name</td></tr> <tr> <td>Middle</td><td>Enter the person's middle initial, optionally you may enter the entire middle name if desired.</td></tr> <tr> <td>Suffix</td><td> <p>If applicable, enter the suffix. Click  icon to perform a lookup of valid values.</p>  </td></tr> </table>	Last Name	Enter the person's last name	Middle	Enter the person's middle initial, optionally you may enter the entire middle name if desired.	Suffix	<p>If applicable, enter the suffix. Click  icon to perform a lookup of valid values.</p> 
Last Name	Enter the person's last name						
Middle	Enter the person's middle initial, optionally you may enter the entire middle name if desired.						
Suffix	<p>If applicable, enter the suffix. Click  icon to perform a lookup of valid values.</p> 						
4	<p>Click the Address tab to view, update or change family member address information.</p>  <p>If you have just added or changed family member information in the Name tab, the address data for that person will be displayed. If the member has more than one family member or beneficiary in the system, the links at the top of the window will be active.</p> <p>View All First 1 of 6 Last. Click on the View All link, Next Arrow button, or the Last link to view additional family members or beneficiaries.</p> <p>Address Tab Data Entry:</p> <table> <tr> <th>Field</th><th>Description/Instructions</th></tr> <tr> <td>Same Address/Phone as Employee</td><td> <p>Click this check box if applicable, the address data will automatically fill based on the member's address information that is already in the system. The phone information will not fill in, you will have to un-check the box in order to enter the family member's phone number. If any of this information is incorrect, it can be updated using one of these procedures:</p> <ul style="list-style-type: none"> Employee Address and Home of Record Employee Home and Mailing Address Change <p>Un-check the box if the family member's or beneficiary's address is no longer the same as the member's.</p> </td></tr> </table>	Field	Description/Instructions	Same Address/Phone as Employee	<p>Click this check box if applicable, the address data will automatically fill based on the member's address information that is already in the system. The phone information will not fill in, you will have to un-check the box in order to enter the family member's phone number. If any of this information is incorrect, it can be updated using one of these procedures:</p> <ul style="list-style-type: none"> Employee Address and Home of Record Employee Home and Mailing Address Change <p>Un-check the box if the family member's or beneficiary's address is no longer the same as the member's.</p>		
Field	Description/Instructions						
Same Address/Phone as Employee	<p>Click this check box if applicable, the address data will automatically fill based on the member's address information that is already in the system. The phone information will not fill in, you will have to un-check the box in order to enter the family member's phone number. If any of this information is incorrect, it can be updated using one of these procedures:</p> <ul style="list-style-type: none"> Employee Address and Home of Record Employee Home and Mailing Address Change <p>Un-check the box if the family member's or beneficiary's address is no longer the same as the member's.</p>						

Step	Action														
4	<table border="1"> <tr> <td>Address 1 Address 2 Address 3</td><td>Use these fields to enter the street address, P O Box, apartment number, etc.</td></tr> <tr> <td>City</td><td>Enter the City</td></tr> <tr> <td>County</td><td>Not used for U. S. Addresses, enter if necessary for foreign addresses.</td></tr> <tr> <td>State</td><td>Enter the standard two-letter state abbreviation code. Click the  icon to perform a lookup of codes if necessary.</td></tr> <tr> <td>Province</td><td>Not used for U. S. Addresses, enter if necessary for foreign addresses.</td></tr> <tr> <td>Postal</td><td>Enter the zip code for U. S. Addresses or postal code for foreign addresses.</td></tr> <tr> <td>Phone</td><td>Enter the Home Phone number of the family member/beneficiary.</td></tr> </table>	Address 1 Address 2 Address 3	Use these fields to enter the street address, P O Box, apartment number, etc.	City	Enter the City	County	Not used for U. S. Addresses, enter if necessary for foreign addresses.	State	Enter the standard two-letter state abbreviation code. Click the  icon to perform a lookup of codes if necessary.	Province	Not used for U. S. Addresses, enter if necessary for foreign addresses.	Postal	Enter the zip code for U. S. Addresses or postal code for foreign addresses.	Phone	Enter the Home Phone number of the family member/beneficiary.
Address 1 Address 2 Address 3	Use these fields to enter the street address, P O Box, apartment number, etc.														
City	Enter the City														
County	Not used for U. S. Addresses, enter if necessary for foreign addresses.														
State	Enter the standard two-letter state abbreviation code. Click the  icon to perform a lookup of codes if necessary.														
Province	Not used for U. S. Addresses, enter if necessary for foreign addresses.														
Postal	Enter the zip code for U. S. Addresses or postal code for foreign addresses.														
Phone	Enter the Home Phone number of the family member/beneficiary.														
5	<p>Click the Personal Profile tab. This tab is used to designate BAH eligibility, provide Spouse-In-Service information, and record other personal information about the family member. Be sure to check the "Spouse-in-Service" block when the member's spouse is in any branch or component of the military.</p> <p>Note: The Gender value defaults to Male and the Martial Status defaults to Single</p> <p>If you have just added or changed family member beneficiary information in the Name and address tabs, the data for that person will be displayed. If the member has more than one family member or beneficiary in the system, the links at the top of the window will be active. View All First  1 of 6  Last. Click on the View All link, Next Arrow button, or the Last link to view additional family members.</p>  <p>The screenshot shows the 'Personal Profile' form with the following fields and values:</p> <ul style="list-style-type: none"> Dependent/Beneficiary: Last,First L Relationship to Employee: Spouse ID: 01 SP Birthdate: 03/20/1960 Birth Country: (lookup icon) Birth Location: (lookup icon) BAH Eligible: <input checked="" type="checkbox"/> BAH Eligibility Date: 01/21/1985 Greater Than 50% Support: <input type="checkbox"/> Gender: Female Spouse In Service: <input type="checkbox"/> Student: <input type="checkbox"/> Disabled: <input type="checkbox"/> Smoker: <input type="checkbox"/> Marital Status: Married Marital Status Date: 11/26/1982 Student Status Date: (lookup icon) Occupation: (text field) Medicare Entitled Date: (text field) Date of Death: (text field) Riders/Orders Phone Numbers National ID: (dropdown) Country: USA National ID Type: PR Description: Social Security Number National ID: 123456789 Primary ID: <input checked="" type="checkbox"/> 														



Complete the fields as indicated on the next page when adding family members/dependents.

Personal Profile Tab Data Entry

Field	Description/Instructions
Birth date	The family member's/dependent's date of birth. This field must be completed if the dependent type is "Dependent" or "Depnd/Benf" (BAH Eligible).
Birth Country	The family member's/dependent's country of birth. Enter the standard three-letter country code (e.g. "USA" for United States of America). Click the  icon to lookup valid codes if necessary.
State Province	The family member's/dependent's state or province (Field label will change depending on the country code entered.) of birth. Enter the standard two-letter abbreviation. Click the  to lookup valid codes if necessary.
Birth Location	Enter the birth city.
BAH Eligible	<p>Click this checkbox if the member will be entitled to BAH with dependents for this family member. Also, click this checkbox even if the member's spouse, in a member-to-member marriage, is on active duty. The spouse in service block (see below) must be checked also.</p> <p>Before adding a BAH Eligible Family Member consult Chapter 3-F of the Coast Guard Pay Manual, COMDTINST M7220.29(series).</p> <p>If the person you are adding is a BAH eligible family member as outlined in the Coast Guard Pay Manual, then this box should be checked.</p> <p>If not a BAH eligible family member (i.e. a child over age 21 and not a full time student), this box should not be checked. Exception: <u>Check this block even if the spouse is an active duty service member.</u></p>
BAH Eligibility Date	<p>If adding a BAH Eligible Family member, enter the date:</p> <ul style="list-style-type: none"> ○ the member began support (e. g. Child's birth date) ○ dependency was approved by PSC (LGL) ○ of marriage <p>Note: If the date of marriage, child's date of birth, or dependency is prior to the member's accession date, then the date of accession should be used.</p>
Greater than 50% Support	Click this checkbox only when the family member does not reside with the member and receives more than 50% of their support from the member.
Gender	Choose the family member's gender from the drop-down list.
Marital Status	Chose the family member's marital status from the drop-down list.
Marital Status Date	<p>Enter the date corresponding to the martial status chosen above. May be left blank when the family member is single.</p> <p>Note: If adding a spouse, this is the date that will be shown as the Date of Marriage on the BAH Dependency Form</p>

Dependency and Emergency Data

Personal Profile Tab Data Entry (cont'd)

Field	Description/Instructions
Spouse in Service/Branch of Service	Spouse in Service. Click the checkbox if this family member is the member's spouse and is in the service. When you click this checkbox, a new drop-down menu item will appear from which to choose the branch of service. You must also enter the spouse's SSN in the National ID information below. The BAH Eligible checkbox (above) must also be marked even if the spouse is on active duty.
Student	Check this box when the family member is a child over age 21 but less than 23 attending school full time and is dependent of the member of over half of their support.
Student Status Date	Enter the date the student status became effective.
Disabled	Check this box when the family member is an incapacitated child over age 21
Smoker	Not used, leave blank
Occupation	Not used, leave blank
Medicare Entitled Date	Not used, leave blank
Riders/Orders	Not used
Phone Numbers	Click this link to add additional contact phone numbers for the family member.
National ID	This section is used to record the family member's Social Security Number (SSN). If the member's spouse is in the service, you must provide an SSN.
Country	Enter USA
National ID Type Description	Enter PR (for "Primary")
National ID	Enter the family member's SSN.
Primary ID	Check this box
Step	Action
6	<p>Click the  button.</p> <p>Carefully review the data you have entered before saving this transaction. Be absolutely sure all that all the data is correct and that you have not made any typographical errors. Be sure you entered the correct employee ID number when you began this transaction. If you have any questions or concerns, cancel the transaction and ask for help.</p> <p>Click  to proceed.</p>

You may now close the window and return to the Activity Guide to begin another transaction.

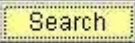


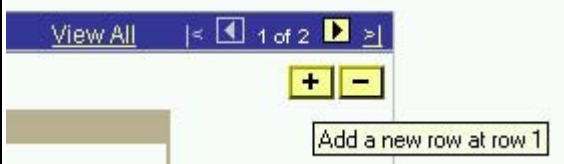
Marriage, Divorce or Spouse's Death

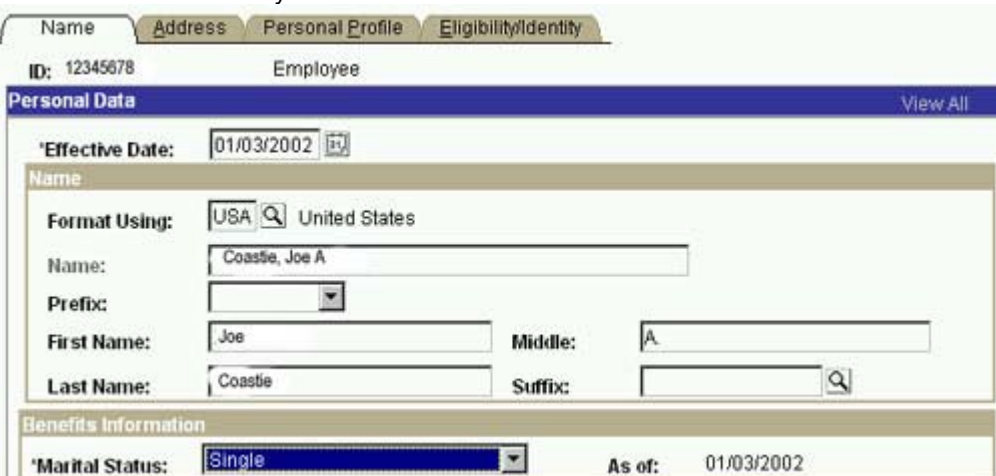



Introduction:

This section provides the procedures for updating a member's marital status.

Procedure:

Start [PeopleSoft, sign in](#) and follow these steps to view, enter or change a member's marital status.

Step	Action
1	<p>Click the Marriage, Divorce or Spouse's death link on the Dependency/Emergency Data Activity Guide.</p> <p>A search page will appear. Enter the member's employee ID number or other search criteria (see Employee ID Search Tips) and click the  button to select the member you wish to display.</p> <p> When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or national ID before making any changes.</p>
2	<p>The Employee Personal Data page will display. If you are changing the member's marital status or adding a new address, click the  to begin a new transaction. The effective date field will change to today's date and the number of rows will increase. If you are just viewing the information it is not necessary to add a new row.</p> 

Step	Action
3	<p>The member's marital status is shown on the first tab (Name tab of the Personal Data page).</p> <p>Reminder: If a member's marital status changes you must also update Employee Family Member and Beneficiary Information and Elections and Beneficiaries.</p>  <ul style="list-style-type: none"> Enter the effective date of the change in the Effective Date field (dates are all numeric and are entered in MM/DD/YYYY format, click the  icon to look up the date if necessary). Note: This is not the date that will be reflected as the Date of Marriage on the BAH/Dependency Data form. Update/correct the spouse's Marital Status Date if the BAH/Dependency Data form does not show the correct date. Choose the Marital Status from the drop down menu in the Benefits Information section of the page. 
4	<p>Click  to save the information.</p>

You may now close the window to return to the Activity Guide to begin another transaction.

SGLI and Dependent SGLI

Introduction:

This section provides the procedures for entering a member's **SGLI** (*Servicemember's Group Life Insurance*) and Dependent SGLI elections.



After the data is entered and saved, PeopleSoft will generate **JUMPS** (*Joint Uniform Military Pay System*) transactions to start or stop deductions from the member's pay for SGLI premiums.

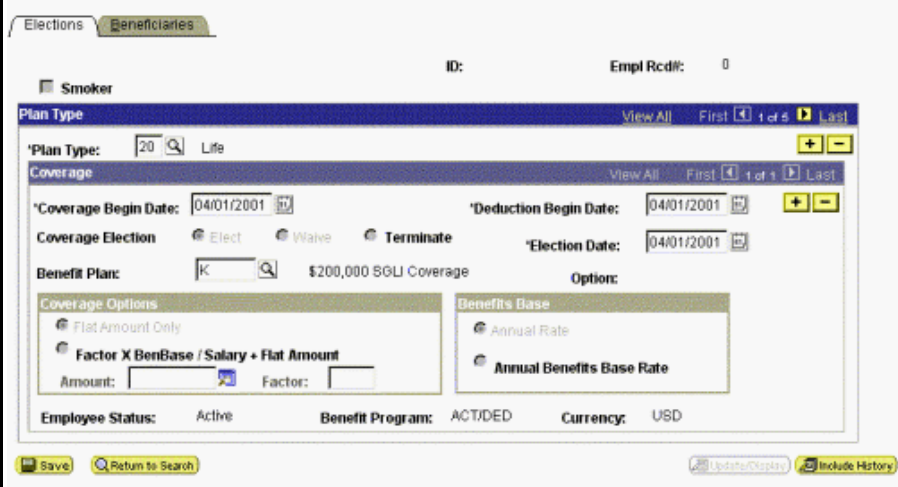


Before You Begin:

For SGLI elections, the beneficiaries information may be left blank. SGLI beneficiary designations are made by the member on form SGLV-8286 and do not need to be duplicated in PeopleSoft to be valid. In PeopleSoft, we are primarily concerned with capturing the member's coverage election so the appropriate payroll transactions can be initiated. **However, you must enter the member's spouse as the beneficiary when inputting SGLI-Family elections. This is true even if the member is declining coverage or stopping coverage.**




Procedure



Follow these steps to enter SGLI elections.

Step	Action
1	Click the SGLI and Dependent SGLI link on the Dependency Emergency Data Activity Guide.
2	<p>A search page will appear. Enter the member's employee ID number or other search criteria (see Employee ID Search Tips) and click the  button to select the member you wish to display.</p> <p> When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or national ID before making any changes.</p>
3	<p>The Life and AD/D Benefits page will display. There are two tabs on this page.</p> <ul style="list-style-type: none"> • Elections • Beneficiaries

Step	Action																		
3	<p>The Elections tab must be completed first and is displayed when the page opens.</p> <p>Home > Compensate Employees > Administer Base Benefits > Use > Life and ADD Benefits</p>  <p>Elections Beneficiaries</p>																		
4	<p>Click the "View All" link at the top of the page to display all the plan types the member has on file.</p> 																		
5	<p>Review the plan types the member has on file.</p> <table><thead><tr><th>Plan Type</th><th>Title</th><th>Purpose</th></tr></thead><tbody><tr><td>20</td><td>Life</td><td>SGLI on the life of the member</td></tr><tr><td>25</td><td>Dependent Life</td><td>SGLI on the life of the spouse</td></tr><tr><td>2A</td><td>Death Gratuity Benefit</td><td>Payment of Death Gratuity when there is no surviving spouse or children.</td></tr><tr><td>2B</td><td>Member Missing</td><td>Person to receive an allotment of funds if member is missing or unable to transmit funds.</td></tr><tr><td>2C</td><td>Unpaid Pay & Allowances</td><td>Person(s) to receive unpaid pay & allowances due the member at the time of death.</td></tr></tbody></table> <p>Plan Types 2A, 2B & 2C will appear as choices but are not used in this procedure.</p>	Plan Type	Title	Purpose	20	Life	SGLI on the life of the member	25	Dependent Life	SGLI on the life of the spouse	2A	Death Gratuity Benefit	Payment of Death Gratuity when there is no surviving spouse or children.	2B	Member Missing	Person to receive an allotment of funds if member is missing or unable to transmit funds.	2C	Unpaid Pay & Allowances	Person(s) to receive unpaid pay & allowances due the member at the time of death.
Plan Type	Title	Purpose																	
20	Life	SGLI on the life of the member																	
25	Dependent Life	SGLI on the life of the spouse																	
2A	Death Gratuity Benefit	Payment of Death Gratuity when there is no surviving spouse or children.																	
2B	Member Missing	Person to receive an allotment of funds if member is missing or unable to transmit funds.																	
2C	Unpaid Pay & Allowances	Person(s) to receive unpaid pay & allowances due the member at the time of death.																	
<p>If the Plan Type you need to change is not listed, add it by clicking the uppermost  button to add new plan type.</p>																			

Step	Action										
4	<div data-bbox="414 275 836 514"> </div> <div data-bbox="852 331 1218 394" data-label="Text"> <p>--Add row button for new plan types</p> </div> <div data-bbox="852 457 1282 520" data-label="Text"> <p>--Add row button for new coverage elections within an existing plan type</p> </div> <p>A new row will be inserted. The Plan Type will default to an existing plan type, click the to lookup and change the Plan Type before continuing.</p> <p>If the Plan Type you need to change is listed, add a new coverage election by clicking the in that Plan Type's row.</p> <p>Note: If you are updated an existing election, and that election has not taken effect yet, you can make changes to it without first inserting a new row. If the Coverage Begin Date and Election Date fields are in the future, the election has not taken effect yet and can be changed.</p>										
6	<p>Complete the Coverage Election as follows.</p> <table border="1"> <thead> <tr> <th>Field</th><th>Description/Instructions</th></tr> </thead> <tbody> <tr> <td>Smoker</td><td>Not used, leave unchecked</td></tr> <tr> <td>Coverage Begin Date</td><td> <p>Coverage begin date is required when setting up a new Coverage Election.</p> <p>For SGLI/Family-SGLI plan types: Enter the date the member signed the SGLV-8286 or SGLV-8286A form.</p> <p>Enter the date or use the date calendar icon to bring up the date screen.</p> </td></tr> <tr> <td>Deduction Begin Date</td><td>Deduction begin date will be setup based on the new hire date. Future changes will equal the Coverage Begin Date. No changes are required to this field.</td></tr> <tr> <td>Coverage Election</td><td>'Elect' is the default choice and cannot be changed for any plan type.</td></tr> </tbody> </table>	Field	Description/Instructions	Smoker	Not used, leave unchecked	Coverage Begin Date	<p>Coverage begin date is required when setting up a new Coverage Election.</p> <p>For SGLI/Family-SGLI plan types: Enter the date the member signed the SGLV-8286 or SGLV-8286A form.</p> <p>Enter the date or use the date calendar icon to bring up the date screen.</p>	Deduction Begin Date	Deduction begin date will be setup based on the new hire date. Future changes will equal the Coverage Begin Date. No changes are required to this field.	Coverage Election	'Elect' is the default choice and cannot be changed for any plan type.
Field	Description/Instructions										
Smoker	Not used, leave unchecked										
Coverage Begin Date	<p>Coverage begin date is required when setting up a new Coverage Election.</p> <p>For SGLI/Family-SGLI plan types: Enter the date the member signed the SGLV-8286 or SGLV-8286A form.</p> <p>Enter the date or use the date calendar icon to bring up the date screen.</p>										
Deduction Begin Date	Deduction begin date will be setup based on the new hire date. Future changes will equal the Coverage Begin Date. No changes are required to this field.										
Coverage Election	'Elect' is the default choice and cannot be changed for any plan type.										

Step	Action										
6	<div>Benefit Plan</div> <p>Click the  to lookup the Benefit Plan Code. SGLI has codes for coverage from \$0 (declined) to \$250K. Family Member SGLI has codes for coverage from \$0 (declined) to \$100K. The other plan types are not used (example for Family SGLI shown below):</p> <table> <tr> <th>Plan Type</th><th>Benefit Plan</th></tr> <tr> <td>Dependent Life (Family-SGLI)</td><td> 0 Zero Option Family SGLI 1 \$10,000 Family SGLI Coverage 2 \$20,000 SGLI Family Coverage 3 \$30,000 SGLI Family Coverage 4 \$40,000 SGLI Family Coverage 5 \$50,000 SGLI Family Coverage 6 \$60,000 SGLI Family Coverage 7 \$70,000 SGLI Family Coverage 8 \$80,000 SGLI Family Coverage 9 \$90,000 SGLI Family Coverage A \$100,000 SGLI Family Coverage Y - Administrative Stop. Can only be used by PSC Topeka. </td></tr> </table>	Plan Type	Benefit Plan	Dependent Life (Family-SGLI)	0 Zero Option Family SGLI 1 \$10,000 Family SGLI Coverage 2 \$20,000 SGLI Family Coverage 3 \$30,000 SGLI Family Coverage 4 \$40,000 SGLI Family Coverage 5 \$50,000 SGLI Family Coverage 6 \$60,000 SGLI Family Coverage 7 \$70,000 SGLI Family Coverage 8 \$80,000 SGLI Family Coverage 9 \$90,000 SGLI Family Coverage A \$100,000 SGLI Family Coverage Y - Administrative Stop. Can only be used by PSC Topeka.						
Plan Type	Benefit Plan										
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	<div>Coverage Options</div> <div>Base Benefits</div> <p>These areas are not used.</p>										
7	<p>Click the Beneficiaries tab to enter the member's beneficiary designations for the coverage you just added.</p> <p>For SGLI elections (for insurance on the life of the member), the beneficiaries information may be left blank. SGLI beneficiary designations are made by the member on form SGLV-8286 and do not need to be duplicated in PeopleSoft to be valid. In PeopleSoft, we are primarily concerned with capturing the member's coverage election so the appropriate payroll transactions can be initiated. However, you must enter the member's spouse as the beneficiary when inputting SGLI-Family elections. This is true even if the member is declining coverage or stopping coverage.</p> <p>Note: Before a person can be listed as a beneficiary you must add them using the Employee Family Member and Beneficiary Information update/change process</p> <p>Complete the Beneficiary information as follows. Use the  and  buttons to add or remove beneficiary data rows.</p> <table> <tr> <th>Field</th><th>Description/Instructions</th></tr> <tr> <td>Plan Type</td><td>PeopleSoft populates the plan type from the Elections page. Click on View All and then use the scroll bar to view additional plan types.</td></tr> <tr> <td>Coverage Begin Date</td><td>PeopleSoft populates these fields from the selected coverage.</td></tr> <tr> <td>Effective Date</td><td></td></tr> <tr> <td>Benefit Plan</td><td></td></tr> </table>	Field	Description/Instructions	Plan Type	PeopleSoft populates the plan type from the Elections page. Click on View All and then use the scroll bar to view additional plan types.	Coverage Begin Date	PeopleSoft populates these fields from the selected coverage.	Effective Date		Benefit Plan	
Field	Description/Instructions										
Plan Type	PeopleSoft populates the plan type from the Elections page. Click on View All and then use the scroll bar to view additional plan types.										
Coverage Begin Date	PeopleSoft populates these fields from the selected coverage.										
Effective Date											
Benefit Plan											

Step	Action	
7	Distribution By Law	Default value is Checked upon entry into the Coast Guard. This is used when no beneficiary is actually selected for the applicable benefit plan.
	Beneficiary ID	Click the  for a listing of available beneficiaries. If the beneficiary is not listed, you will have to add them using the Employee Family Member and Beneficiary Information update/change process. Note: You must enter the member's spouse as the beneficiary when inputting SGLI-Family elections. This is true even if the member is declining coverage or stopping coverage.
	Percent of Benefit	Percent of the benefit amount is must equal 100% for all Plan Types except Family Member SGLI, it will be blank, and Member Missing, it can be less than 100%.
	Flat Amount	Not used, leave blank.
	Payment Method	For SGLI, choose Lump Sum or Equal Payments as indicated on the member's SGLV-8286 form. All other Plan Types are Lump Sum.
	Excess	Not used, leave unchecked.
	Contingent	If this beneficiary is not the primary beneficiary, check this field. Whenever this field is checked, you must list a principle beneficiary or beneficiaries.
	Totals	PeopleSoft populates based on the sum of the values entered in the Percent of Benefit field for Primary and Contingent beneficiaries. The totals must equal 100% in order to save the data
8	Click  to save your changes. Carefully review the data you have entered before saving this transaction. Be absolutely sure all that all the data is correct and that you have not made any typographical errors. Be sure you entered the correct employee ID number when you began this transaction. If you have any questions or concerns, cancel the transaction and ask for help.	

You may now close the window and return to the Activity Guide to begin another transaction.

Print BAH/Dependency Form

Introduction:

This section provides the procedure to print a BAH/Dependency/ form for an individual. A report, listing all the members at a unit and their BAH eligible family members is also available. See the [Print Dependency Data By Unit](#) topic for more information.

The BAH/Dependency data form lists a member's BAH eligible dependents and provides an area for the member to certify the accuracy of the information.


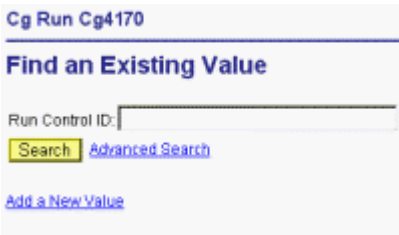
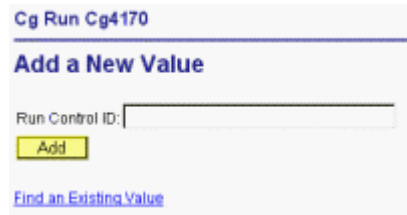



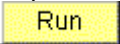
Sample report

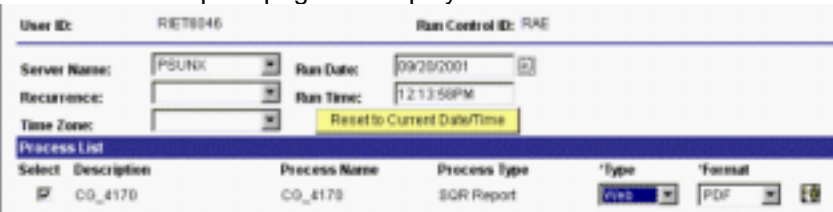
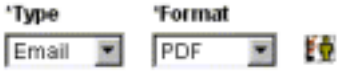




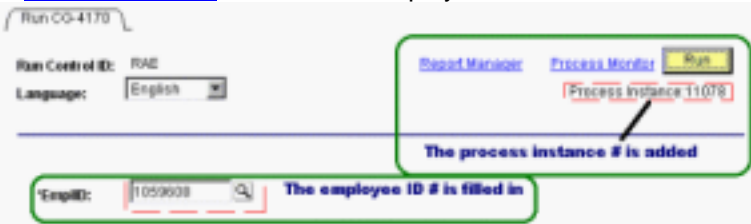
DEPARTMENT OF HOMELAND SECURITY U.S. COAST GUARD COMPUTER GENERATED		BAH/DEPENDENCY DATA	
EMPLID 900930	NAME Smith, John S.	RATERANK Chief Boatswain's Mate	CURRENT DUTY STATION 000000 - CGC UNDERWAY
SERVICING PERSON 000269 - CG GP CHARLESTON		MARITAL STATUS Married	DATE OF MARPAGE 10-JAN-1999
SPOUSE IN SERVICE INFORMATION			
DEPENDENCY DATA			
NAME: Smith, Joan T.	DATE OF BIRTH: 15-AUG-1948	DEPENDENCY DATE: 10-JAN-1999	SOCIAL SECURITY NUMBER: 1612070 RELATIONSHIP: Spouse
BAH/ELIGIBLE DEPENDENT: YES			
NAME: Smith, John A.	DATE OF BIRTH: 22-AUG-1948	DEPENDENCY DATE: 22-AUG-1999	SOCIAL SECURITY NUMBER: 123456789 RELATIONSHIP: Son
BAH/ELIGIBLE DEPENDENT: YES			
NAME: Smith, Jane, D.	DATE OF BIRTH: 30-MAY-1968	DEPENDENCY DATE: 30-MAY-1999	SOCIAL SECURITY NUMBER: 987654321 RELATIONSHIP: Daughter
BAH/ELIGIBLE DEPENDENT: YES			
NAME:	DATE OF BIRTH:	DEPENDENCY DATE:	SOCIAL SECURITY NUMBER: RELATIONSHIP:
BAH/ELIGIBLE DEPENDENT:			
NAME:	DATE OF BIRTH:	DEPENDENCY DATE:	SOCIAL SECURITY NUMBER: RELATIONSHIP:
BAH/ELIGIBLE DEPENDENT:			
NAME:	DATE OF BIRTH:	DEPENDENCY DATE:	SOCIAL SECURITY NUMBER: RELATIONSHIP:
BAH/ELIGIBLE DEPENDENT:			
NAME:	DATE OF BIRTH:	DEPENDENCY DATE:	SOCIAL SECURITY NUMBER: RELATIONSHIP:
BAH/ELIGIBLE DEPENDENT:			
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BAH/ELIGIBLE DEPENDENT:			
NAME:	DATE OF BIRTH:	DEPENDENCY DATE:	SOCIAL SECURITY NUMBER: RELATIONSHIP:
BAH/ELIGIBLE DEPENDENT:			
FOR CG PERSONNEL SERVICE CENTER USE ONLY			
The dependency status of the following family member(s) has been reviewed by PSC LGL in accordance with the CG Pay Manual, COMDTINST M220.29(series). The family member(s) listed below are approved for BAH eligibility commencing on the date(s) indicated:			
NR:	DATE:	NR:	DATE:
NR:	DATE:	NR:	DATE:
PSC APPROVAL SIGNATURE:		DATE:	
MEMBER'S CERTIFICATION			
By signature below, I certify that I am supporting the dependents listed above and I will notify my Commanding Officer/Office in Charge of any changes in dependency status. I am aware that making false statements on a claim against the U.S. Government is punishable by court-martial. The penalty for willfully making a false claim is: A maximum fine of \$10,000 or maximum imprisonment of 5 years, or both (U.S. Code, Title 10, Section 267). I further certify that I have reviewed all entries on this form and by signature below, the information contained herein is correct.			
SIGNATURE OF MEMBER:		DATE:	

CHANGES - Previous editions are obsolete.

Procedure:

Follow these steps print a BAH/Dependency Data form.

Step	Action
1	Click the Print a BAH/Dependency Form link on the Dependency and Emergency Data Activity Guide
2	<p>The Run Control ID Entry Page will appear.</p> <p>If you have used this process before, enter your initials in the Run Control ID block and click the  button.</p>  <p>If this is the first time you have used this process, click the Add a New Value link.</p>  <ol style="list-style-type: none"> 1. Enter your initials in the Run Control ID block. 2. Click the  button.
3	<p>The CG-4170 Run page will display.</p>  <ol style="list-style-type: none"> 2. Enter the Employee ID of the member you want to generate a CG-4170A for. • You can use the  button to lookup the EmplID if necessary. See Search Tips for help. 2. Click the  button to begin processing.

Step	Action
4	<p>The Process Scheduler Request page will display.</p>  <p>In the Server Name field, click the drop-down menu and choose PSUNX. Change the *Type field to "Email". Set the *Format field to "PDF".</p>  <p>If you selected Email you can click on the Distribution icon  to add additional addresses and customized the email message. This step is not necessary if you have your business email address entered in the system, the report will automatically be mailed to your business email address. Use this feature if you want to email the report to other addresses. The Distribution Detail page will display, scroll down to the E-Mail Only section and enter the subject, text and e-mail address for the message:</p>  <p>Insert additional email addresses in the Email Address List box. Separate entries with a (;) e.g. "jjohnson@unit.uscg.mil;tsmith@unit.uscg.mil".</p> <p>Click  to continue. You will be returned to the Process Scheduler Request page.</p> <p>Click  on the Process Scheduler Request page.</p>
5	<p>The Run CG-4170 page will display again. A "Process Instance" number will appear under the Process Monitor link and the Employee ID number will show in the EmplID field.</p>  <p>If you selected "Email" for the type, you may exit the application. The CG-4170A should arrive via e-mail within a few minutes.</p>
6	<p>Close the Report and Process Monitor windows then select another activity from the Dependency and Emergency Data Activity Guide page.</p>

Print BAH/Dependency Forms for a Unit

Introduction

This section provides the procedure for running the BAH/Dependency Data form. The BAH/Dependency data form lists a member's BAH eligible dependents and provides an area for the member to certify the accuracy of the information.

Sample page from report

DEPARTMENT OF HOMELAND SECURITY U.S. COAST GUARD COMPUTER GENERATED		BAH/DEPENDENCY DATA	
EMPID: 100000	NAME: Smith, John S.	DATE/GRK: Chief Boatswain's Mate	CURRENT DUTY STATION: 000000 - CGC UNDERWAY
SERVICING PERSON: 000269 - CG GP CHARLESTON		MARITAL STATUS: Married	DATE OF MARRIAGE: 10-JAN-1989
SPOUSE IN-SERVICE INFORMATION			
DEPENDENCY DATA			
NAME: Smith, Joan T.	BAH/ELIGIBLE DEPENDENT: YES	DATE OF BIRTH: 15-AUG-1968	DEPENDENCY DATE: 10-JAN-1989
			SOCIAL SECURITY NUMBER: 99121272
			RELATIONSHIP: Spouse
NAME: Smith, John A.	BAH/ELIGIBLE DEPENDENT: YES	DATE OF BIRTH: 22-AUG-1994	DEPENDENCY DATE: 22-AUG-1999
			SOCIAL SECURITY NUMBER: 123456789
			RELATIONSHIP: Son
NAME: Smith, Jane, D.	BAH/ELIGIBLE DEPENDENT: YES	DATE OF BIRTH: 30-MAY-1998	DEPENDENCY DATE: 30-MAY-1998
			SOCIAL SECURITY NUMBER: 987654321
			RELATIONSHIP: Daughter
NAME:	BAH/ELIGIBLE DEPENDENT:	DATE OF BIRTH:	DEPENDENCY DATE:
			SOCIAL SECURITY NUMBER:
			RELATIONSHIP:
NAME:	BAH/ELIGIBLE DEPENDENT:	DATE OF BIRTH:	DEPENDENCY DATE:
			SOCIAL SECURITY NUMBER:
			RELATIONSHIP:
NAME:	BAH/ELIGIBLE DEPENDENT:	DATE OF BIRTH:	DEPENDENCY DATE:
			SOCIAL SECURITY NUMBER:
			RELATIONSHIP:
NAME:	BAH/ELIGIBLE DEPENDENT:	DATE OF BIRTH:	DEPENDENCY DATE:
			SOCIAL SECURITY NUMBER:
			RELATIONSHIP:
NAME:	BAH/ELIGIBLE DEPENDENT:	DATE OF BIRTH:	DEPENDENCY DATE:
			SOCIAL SECURITY NUMBER:
			RELATIONSHIP:
NAME:	BAH/ELIGIBLE DEPENDENT:	DATE OF BIRTH:	DEPENDENCY DATE:
			SOCIAL SECURITY NUMBER:
			RELATIONSHIP:

FOR CG PERSONNEL SERVICE CENTER USE ONLY

The dependency status of the following family member(s) has been reviewed by PSC LGL in accordance with the CG Pay Manual, COMDTINST M7220.29(series). The family member(s) listed below are approved for BAH eligibility commencing on the date(s) indicated:

NBR:	DATE:	NBR:	DATE:	NBR:	DATE:
NBR:	DATE:	NBR:	DATE:	NBR:	DATE:

PSC APPROVAL SIGNATURE: _____ DATE: _____

MEMBER'S CERTIFICATION






By signature below, I certify that I am supporting the dependents listed above and I will notify my Commanding Officer/Office in Charge of any changes in dependency status. I am aware that making false statements on a claim against the U.S. Government is punishable by court-martial. The penalty for willfully making a false claim is: A maximum fine of \$10,800 or maximum imprisonment of 5 years, or both (U.S. Code, Title 10, Section 287). I further certify that I have reviewed all entries on this form and by signature below, the information contained hereon is correct.



SIGNATURE OF MEMBER: _____ DATE: _____




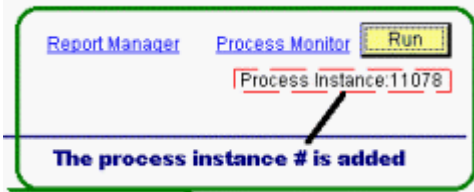
COMPGEN - Previous editions are obsolete.

Procedure




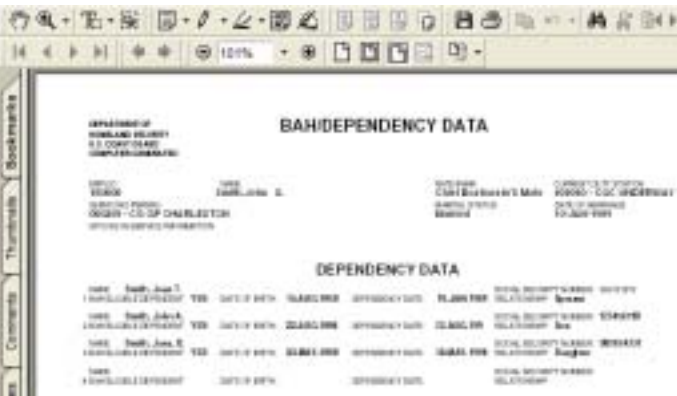
Start Internet Explorer, sign into PeopleSoft (note, see the [Signing In topic](#) in the Using PeopleSoft section if you need help getting started) and follow these steps to complete this procedure.

Step	Action
1	<p>Select menu items in the following order (note, see the Basic Navigation topic for help on using menus):</p> <p>Administer Workforce > Administer Workforce (GBL) > Use Dependency/Emergency Data</p>
2	<p>The Dependency/Emergency Data Activity Guide will display. Select the Print a BAH/Dependency Form for a Unit link</p> 
3	<p>The Run Control ID Entry Page will open in a new window..</p> <p>If you have used this process before, enter your initials in the Run Control ID block and click the  button.</p>  <p>If this is the first time you have used this process, click the Add a New Value link.</p>  <ol style="list-style-type: none"> 1. Enter your initials in the Run Control ID block. 2. Click the  button.

Step	Action																																	
4	<p>The Run page will display.</p> <div></div> <p>1. Enter the Department ID of the unit you want to generate forms for.</p> <ul style="list-style-type: none">You can use the  button to lookup the Department ID if necessary. See Search Tips for help.Use the Search By Operational Facility Code (OPFAC) or Search Description Option to locate department IDs <p>Example search by OPFAC</p> <p>Home > Administer Workforce > Administer Workforce (GE</p> <p>Lookup DeptID</p> <p>Search By: <input type="text" value="Operational Facility Code"/></p> <p>Operational Facility Code: <input type="text" value="71108"/></p> <p><input type="button" value="Lookup"/> <input type="button" value="Cancel"/> Advanced Lookup</p> <p>Search Results</p> <p>View All</p> <table><tr><th>Operational Facility Code</th><th>Department</th><th>Description</th></tr><tr><td>71108</td><td>000493</td><td>CGO EIGHT</td></tr><tr><td>71108</td><td>002494</td><td>D8 PUBLIC AFFAIR</td></tr><tr><td>71108</td><td>002495</td><td>D8 C3/IRM STAFF</td></tr><tr><td>71108</td><td>002496</td><td>D8 PLANNING OFI</td></tr><tr><td>71108</td><td>002497</td><td>D8 OPERATIONS I</td></tr></table> <p>Example search by description</p> <p>Search By: <input type="text" value="Description"/></p> <p>Description: <input type="text" value="%D8"/></p> <p><input type="button" value="Lookup"/> <input type="button" value="Cancel"/> Advanced Lookup</p> <p>Search Results</p> <p>View All</p> <table><tr><th>Description</th><th>Department</th><th>Comp</th></tr><tr><td>CGO8 OPERATTACH ST</td><td>004424</td><td>CGA</td></tr><tr><td>D8 ADMIN DIVISION (A)</td><td>002502</td><td>CGA</td></tr><tr><td>D8 ATON&WWY MGMT BRNCH</td><td>002499</td><td>CGA</td></tr><tr><td>D8 BRIDGES (OB)</td><td>002500</td><td>CGA</td></tr></table> <p>2. Click the <input type="button" value="Run"/> button to begin processing.</p>	Operational Facility Code	Department	Description	71108	000493	CGO EIGHT	71108	002494	D8 PUBLIC AFFAIR	71108	002495	D8 C3/IRM STAFF	71108	002496	D8 PLANNING OFI	71108	002497	D8 OPERATIONS I	Description	Department	Comp	CGO8 OPERATTACH ST	004424	CGA	D8 ADMIN DIVISION (A)	002502	CGA	D8 ATON&WWY MGMT BRNCH	002499	CGA	D8 BRIDGES (OB)	002500	CGA
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D8 ATON&WWY MGMT BRNCH	002499	CGA																																
D8 BRIDGES (OB)	002500	CGA																																

Step	Action
5	<p>The Process Scheduler Request page will display</p> 
6	<p>Select Web from the Process Type drop down menu.</p> 
7	<p>Select PDF from the Format drop down menu.</p>  <p>PDF = Adobe Acrobat</p>
8	<p>Click the OK button to launch the process and return to the Process Scheduler Request page.</p>
9	<p>Click the Process Monitor link in the upper right-hand corner of the Process Scheduler Request page.</p> 

Step	Action														
10	<p>The Process Monitor page will display. Click the Refresh button periodically until the Run Status shows "Success" and the Details link is active. It could take some time for the status to change if you are running a large report or the system is heavily loaded.</p> <div><p>Home > PeopleTools > Process Monitor > Inquire > Process Requests</p><div><div>Process List</div><div>Server List</div></div><div>View Process Request For</div><div><div>User: <input type="text" value="RIET6046"/></div><div>Type: <input type="text"/></div><div>Last: <input type="text" value="1"/> Days</div><div>Refresh</div></div><div><div>Server: <input type="text" value="PSUNX"/></div><div>Run Status: <input type="text"/></div><div>Instance: <input type="text"/> to <input type="text"/></div></div><div><input type="checkbox"/> View Job Items</div><div><div>View All</div><div>First</div><div>1-3 of 3</div><div>Last</div></div><table><thead><tr><th>Instance Seq</th><th>Process Type</th><th>Process Name</th><th>User</th><th>Run Date/Time</th><th>Run Status</th><th>Details</th></tr></thead><tbody><tr><td>476108</td><td>SQR Report</td><td>CGASQRPT</td><td>RIET6046</td><td>01/28/2003 15:07:59 EST</td><td>Success</td><td>Details</td></tr></tbody></table></div>	Instance Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Details	476108	SQR Report	CGASQRPT	RIET6046	01/28/2003 15:07:59 EST	Success	Details
Instance Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Details									
476108	SQR Report	CGASQRPT	RIET6046	01/28/2003 15:07:59 EST	Success	Details									
11	<p>Click the Details link. The Process Detail Page will display. Click the View Log/Trace link.</p> <div><div><h3>Process Detail</h3><div>Process</div><div><div>Instance: 476108</div><div>Type: SQR Report</div><div>Name: CGASQRPT</div><div>Description: CGASQRPT</div></div><div><div>Run</div><div>Update Process</div></div><div><div>Run Control ID: RAE</div><div>Location: Server</div><div>Server: PSUNX</div><div>Recurrence:</div></div><div><div>Hold Request</div><div>Queue Request</div><div>Cancel Request</div><div>Delete Request</div><div>Restart Request</div></div><div><div>Date/Time</div><div>Actions</div></div><div><div>Request Created On: 01/28/2003 15:14:55 EST</div><div>Run Anytime After: 01/28/2003 15:07:59 EST</div><div>Began Process At: 01/28/2003 15:15:01 EST</div><div>Ended Process At: 01/28/2003 15:15:10 EST</div></div><div><div>Parameters</div><div>Transfer</div><div>Message Log</div><div>Batch Timings</div><div>View Log/Trace</div></div><div><div>OK</div><div>Cancel</div></div></div></div>														

Step	Action
12	<p>The Report Log Viewer page will open in a new window. Access your report by clicking the link with the report name and number in it (In the example below, cg4170dp_610219.PDF is the link to the report).</p>  <p>Note: You can also save the report to your local system at this time by clicking the right mouse button and selecting "Save Target As...". You will be prompted to select a location to save the file to.</p>
13	<p>Your report will open and display in the web browser. Use the buttons   in the Adobe Acrobat reader to save or print the report.</p> 
14	Close the Report and Process Monitor windows
15	Select another activity from the Dependency and Emergency Data Activity Guide page.

Update a Person's Emergency Contact Information



This section provides the procedures for adding, updating and removing Emergency Contacts for members who do not have access to PeopleSoft self-service.

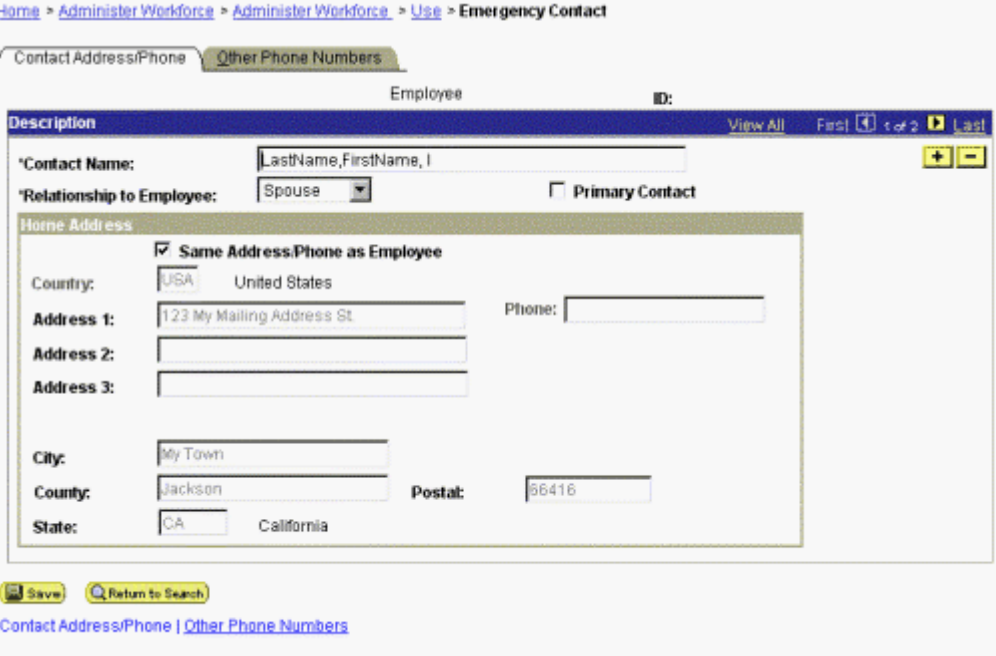






Emergency Contacts are persons, the member designates, who are to be contacted in the event of an emergency. Any person entered as an emergency contact may be contacted in the event the "Primary" contact cannot be reached.






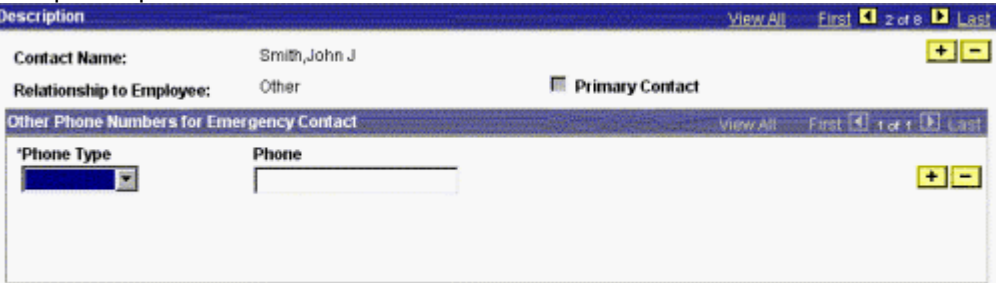



Emergency contact information will be printed on the Emergency Contact Information report. The report can be printed for an [individual](#) or for [all members of a unit](#).

Procedure


Follow these steps to update Emergency Contact information.

Step	Action
1	Click the Update a Person's Emergency Contact Information link on the Dependency/Emergency Data Activity Guide.
2	<p>A search page will appear. Enter the member's employee ID number or other search criteria (see Employee ID Search Tips) and click the  button to select the member you wish to display.</p> <p> When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or national ID before making any changes.</p>
3	<p>The Employee Emergency Contact page will display. There are two tabs on this page.</p> <ol style="list-style-type: none"> 1. The Contact Address/Phone tab (displayed first) allows you to enter the Emergency Contact's name, relationship to the member and address. 2. The Other Phone Numbers tab allows you to enter the Emergency Contact's phone numbers.

Step	Action														
4	<p>Complete/Update the Contact Address/Phone tab.</p> <p>Home > Administer Workforce > Administer Workforce > Use > Emergency Contact</p>  <table border="1"> <thead> <tr> <th>Field/Button or Link</th><th>Description/Instructions</th></tr> </thead> <tbody> <tr> <td>View All</td><td>If the member has more than one Emergency Contact on file, this link will be active. Click it (or the arrow buttons) to view additional Emergency Contacts.</td></tr> <tr> <td></td><td>If you are adding an additional Emergency Contact, click this button to insert a new row</td></tr> <tr> <td></td><td>If you are removing a Emergency Contact, click this button to delete the row. Note: If you delete the only Emergency Contact, the system will not allow you to save until you add a new one. At least one Emergency Contact entry is required.</td></tr> <tr> <td>Contact Name</td><td>Enter the Last Name followed by a comma (,) the first name followed by a comma <u>and a space</u> then the middle initial or middle name. Example: Smith,John J</td></tr> <tr> <td>Relationship to Employee</td><td>Click the drop-down menu for a list of relationship types. Click on a relationship type to select it.</td></tr> <tr> <td>Primary Contact (checkbox)</td><td>Check this box if this is the Primary Emergency Contact for this member. Only one Primary Contact is permitted.</td></tr> </tbody> </table>	Field/Button or Link	Description/Instructions	View All	If the member has more than one Emergency Contact on file, this link will be active. Click it (or the arrow buttons) to view additional Emergency Contacts.		If you are adding an additional Emergency Contact, click this button to insert a new row		If you are removing a Emergency Contact, click this button to delete the row. Note: If you delete the only Emergency Contact, the system will not allow you to save until you add a new one. At least one Emergency Contact entry is required.	Contact Name	Enter the Last Name followed by a comma (,) the first name followed by a comma <u>and a space</u> then the middle initial or middle name. Example: Smith,John J	Relationship to Employee	Click the drop-down menu for a list of relationship types. Click on a relationship type to select it.	Primary Contact (checkbox)	Check this box if this is the Primary Emergency Contact for this member. Only one Primary Contact is permitted.
Field/Button or Link	Description/Instructions														
View All	If the member has more than one Emergency Contact on file, this link will be active. Click it (or the arrow buttons) to view additional Emergency Contacts.														
	If you are adding an additional Emergency Contact, click this button to insert a new row														
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Contact Name	Enter the Last Name followed by a comma (,) the first name followed by a comma <u>and a space</u> then the middle initial or middle name. Example: Smith,John J														
Relationship to Employee	Click the drop-down menu for a list of relationship types. Click on a relationship type to select it.														
Primary Contact (checkbox)	Check this box if this is the Primary Emergency Contact for this member. Only one Primary Contact is permitted.														

Step	Action		
4	Same Address/Phone as Employee (checkbox)	Check this box if the Emergency Contact and member reside at the same address. The remainder of the address information will automatically be filled in.	
	Country 	Defaults to USA. Click the  to lookup country codes for other countries if the Emergency Contact does not reside in the USA.	
	Address (1 through 3)	Enter the mailing address (street, P. O. Box number, etc.) on these lines.	
	Phone	Enter the primary daytime telephone number for the Emergency Contact. Additional phone number can be entered on the next tab.	
	City/Province	This field will change from City to Province depending on the country selected. Enter the city or province Emergency Contact's mailing address.	
	County	Not required. Enter the county if known	
	Postal	Enter the Zip or Postal code.	
	State 	Enter the standard two-letter state abbreviate code. Click the  to lookup codes if necessary.	
5	Click the Other Phones Tab to enter additional phone numbers for this emergency contact or click the  button if there are no additional phone numbers or Emergency Contacts to be added.		
6	Complete/Update the Additional Phone Numbers tab. 		
Field/Button or Link			Description/Instructions
			If the member has more than one Emergency Contact on file, this link will be active. Click it (or the arrow buttons) to view additional Emergency Contacts
			If you are adding an additional Emergency Contact, Phone Number and a blank row is not already displayed, click this button to insert a new row
			If you are removing a Emergency Contact phone, click this button to delete the row.
Phone Type (drop-down menu)			Click the drop-down menu for a list of phone types. Click on a phone type to select it.
Phone			Enter the phone number, area code first.

Dependency and Emergency Data

Step	Action
7	<p>Click the Contact Address Phone Tab to enter additional Emergency contacts or click the  button if there are no additional phone numbers or Emergency Contacts to be added.</p> <p>Carefully review the data you have entered before saving this transaction. Be absolutely sure all that all the data is correct and that you have not made any typographical errors. Be sure you entered the correct employee ID number when you began this transaction. If you have any questions or concerns, cancel the transaction and ask for help.</p>

You may now close the window and return to the Activity Guide to begin another transaction.

Print Emergency Contact Information By Employee ID

Introduction

This section provides the procedure for printing a member's emergency contact information. The report includes the names, addresses, phone numbers of people the member has designated to be notified in the event of an emergency.

```

Department of Homeland Security      EMERGENCY CONTACT INFORMATION
U.S. Coast Guard
Computer-Generated

EMPLID: 1234567      Rank/Rate: YN1/E6      Name: Smith, Sean T.
Duty Station: 000652-CG ISC ST LOUIS      Servicing HR Site: 000652-CG ISC ST LOUIS
Marital Status: Married
  
```

In case of emergency, please notify the following people:

```

Primary Contact:
Name: Smith, Teresa W      Relationship: Spouse
Address: 123 Any Street      Phone: 555/555-1212
        TOPEKA, KS 666144017
  
```

```

Other Phones: Type      Number
               Business  555/555-1235
               Home      555/555-1234
  
```

```

Other Contacts:
Name: Smith, Kirk A.      Relationship: Father
Address: 400 Oak Tree Lane #2      Phone: 354/223-1234
        ANYCITY, LA 70000
  
```

```

Other Phones: Type      Number
               Home      354/223-1234
  
```

```

Name: Jones, Lindamarie A.      Relationship: Mother
Address: 222 MY STREET      Phone: 555/123-1234
        HOUSTON, TX 77042
  
```

```

Other Phones: Type      Number
               Business  555/461-4444
               Cellular  555/123-5595
               Home      555/123-1234
  
```

```

Name: Smith, Jeffrey P.      Relationship: Son
Address: 123 Any Street 312      Phone: 555/555-6114
        TOPEKA, KS 666144017
  
```

```

Name: Smith, Marcus P.      Relationship: Next of Kin
Address: 3202 CATFISH HOLLOW LANE      Phone: 098/555-3456
        HOUSTON, TX 77082
  
```

```


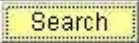



Other Phones: Type      Number
               Business  555/555-3456
               Home      098/555-3456
  
```




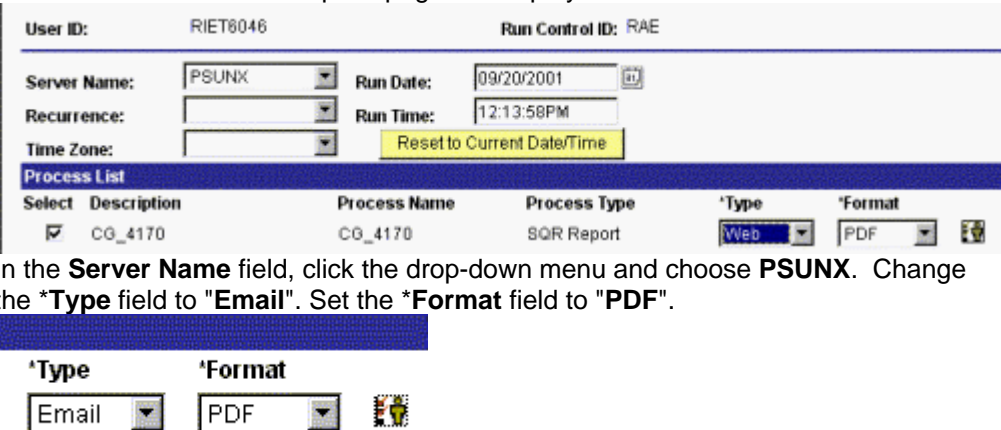

Sample report.

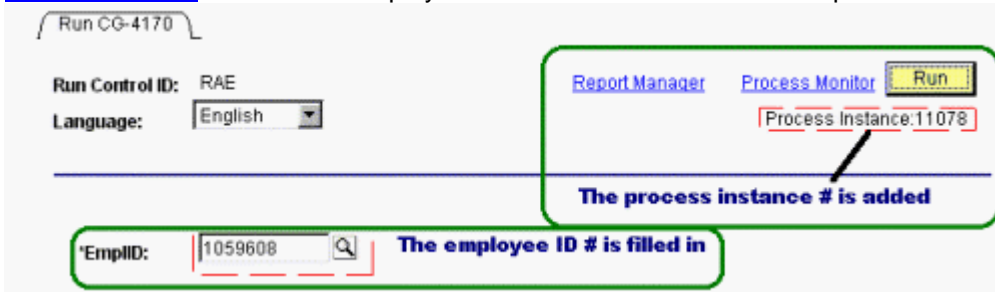
Date Printed: 10/08/2003

Procedure

Start Internet Explorer, sign into PeopleSoft (note, see the [Signing In topic](#) in the Using PeopleSoft section if you need help getting started) and follow these steps to complete this procedure.

Step	Action
1	<p>Select menu items in the following order (note, see the Basic Navigation topic for help on using menus):</p> <p>Administer Workforce > Administer Workforce (GBL) > Use Dependency/Emergency Data</p>
2	<p>The Dependency/Emergency Data Activity Guide will display. Select the Print Emergency Contact Information by EMPLID link</p> <p> Print Emergency Contact Information by EMPLID Use this link to print a specific person's Emergency Contact Information form.</p>
3	<p>The Run Control ID Entry Page will open in a new window.</p> <p>If you have used this process before, enter your initials in the Run Control ID block and click the  button.</p> <div data-bbox="329 961 730 1194"> <p>Cg Run Cg4170</p> <p>Find an Existing Value</p> <p>Run Control ID: <input type="text"/></p> <p> Advanced Search</p> <p>Add a New Value</p> </div> <p style="margin-left: 400px;"><-Initials</p> <ul style="list-style-type: none"> • If this is the first time you have used this process, click the Add a New Value link. <div data-bbox="329 1337 738 1549"> <p>Cg Run Cg4170</p> <p>Add a New Value</p> <p>Run Control ID: <input type="text"/></p> <p></p> <p>Find an Existing Value</p> </div> <ol style="list-style-type: none"> 1. Enter your initials in the Run Control ID block. 2. Click the  button.

Step	Action
4	<p>The Run page will display.</p>  <ol style="list-style-type: none"> Enter the Employee ID of the member you want to generate an Emergency Contact listing for. <ul style="list-style-type: none"> You can use the  button to lookup the EmpID if necessary. See Search Tips for help. Click the  button to begin processing.
5	<p>The Process Scheduler Request page will display.</p>  <p>In the Server Name field, click the drop-down menu and choose PSUNX. Change the *Type field to "Email". Set the *Format field to "PDF".</p> <p>Note: You can select the "WEB" type if you would rather have the report available on the Reports Server. See the Using Process Scheduler Web Option topic for more information.</p> <p>If you selected Email you can click on the Distribution icon  to add additional addresses and customized the email message. This step is not necessary if you have your business email address entered in the system, the report will automatically be mailed to your business email address. Use this feature if you want to email the report to other addresses.</p> <p>The Distribution Detail page will display, scroll down to the E-Mail Only section and enter the subject, text and e-mail address for the message:</p>

Step	Action
5	<p>Email Only</p> <p>Email Subject: <input type="text" value="This is the Subject Line of the E-Mail Message"/></p> <p>Message Text: <input type="text" value="Enter any message text you would like to add to the E-mail."/></p> <p>Email With Log <input type="checkbox"/></p> <p>Email Address List: <input type="text" value="your_email@your_email_address.mil"/></p> <p>Insert additional email addresses in the Email Address List box. Separate entries with a (;) e.g. "jjohnson@unit.uscg.mil;tsmith@unit.uscg.mil.</p> <p>Click OK to continue. You will be returned to the Process Scheduler Request page.</p> <p>Click OK on the Process Scheduler Request page.</p>
6	<p>The Run page will display again. A "Process Instance" number will appear under the Process Monitor link and the Employee ID number will show in the EmplID field.</p>  <p>The screenshot shows the 'Run' page with the following elements: 'Run CG-4170' at the top, 'Run Control ID: RAE' and 'Language: English' in the middle. On the right, there are links for 'Report Manager', 'Process Monitor', and a 'Run' button. Below the 'Process Monitor' link, the text 'Process Instance: 11078' is displayed. At the bottom left, the 'EmplID:' field contains the number '1059608'. Annotations with green boxes and arrows highlight these elements: 'The process instance # is added' points to 'Process Instance: 11078', and 'The employee ID # is filled in' points to the 'EmplID: 1059608' field.</p> <p>If you selected "Email" for the type, you may exit the application by closing the window and returning to the Activity Guide. The report should arrive via e-mail within a few minutes.</p>

You may now close the window and return to the Activity Guide to begin another transaction.

Print Emergency Contact Information for a Unit

Introduction

This section provides the procedure for running the Emergency Contact Data report. The report includes the names, addresses, phone numbers of people the member has designated to be notified in the event of an emergency.

```

Department of Homeland Security      EMERGENCY CONTACT INFORMATION
U.S. Coast Guard
Computer-Generated

EMPLID: 1234567      Rank/Rate: YN1/E6      Name: Smith, Sean T.
Duty Station: 000652-CG ISC ST LOUIS      Servicing HR Site: 000652-CG ISC ST LOUIS
Marital Status: Married
  
```

In case of emergency, please notify the following people:

```

Primary Contact:
Name: Smith, Teresa W      Relationship: Spouse
Address: 123 Any Street      Phone: 555/555-1212
        TOPEKA, KS 666144017
  
```

```

Other Phones: Type      Number
               Business  555/555-1235
               Home      555/555-1234
  
```

```

Other Contacts:
Name: Smith, Kirk A.      Relationship: Father
Address: 400 Oak Tree Lane #2      Phone: 354/223-1234
        ANYCITY, LA 70000
  
```

```

Other Phones: Type      Number
               Home      354/223-1234
  
```

```

Name: Jones, Lindamarie A.      Relationship: Mother
Address: 222 MY STREET      Phone: 555/123-1234
        HOUSTON, TX 77042
  
```

```

Other Phones: Type      Number
               Business  555/461-4444
               Cellular  555/123-5595
               Home      555/123-1234
  
```

```

Name: Smith, Jeffrey P.      Relationship: Son
Address: 123 Any Street 312      Phone: 555/555-6114
        TOPEKA, KS 666144017
  
```

```

Name: Smith, Marcus P.      Relationship: Next of Kin
Address: 3202 CATFISH HOLLOW LANE      Phone: 098/555-3456
        HOUSTON, TX 77082
  
```

```





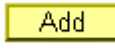
Other Phones: Type      Number
               Business  555/555-3456
               Home      098/555-3456
  
```






Date Printed: 10/08/2003


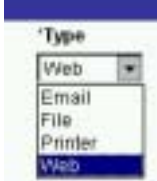
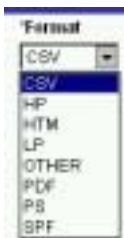


Sample report.

Procedure




Start Internet Explorer, sign into PeopleSoft (note, see the [Signing In topic](#) in the Using PeopleSoft section if you need help getting started) and follow these steps to complete this procedure.

Step	Action
1	<p>Select menu items in the following order (note, see the Basic Navigation topic for help on using menus):</p> <p>Administer Workforce > Administer Workforce (GBL) > Use Dependency/Emergency Data</p>
2	<p>The Dependency/Emergency Data Activity Guide will display. Select the Print Emergency Contact Information for a Unit link</p> <p> Print Emergency Contact Information for a Unit Use this link to print all of the Emergency Contact Information forms for a particular unit.</p>
3	<p>The Run Control ID Entry Page will open in a new window. If you have used this process before, enter your initials in the Run Control ID block and click the  button.</p> <div data-bbox="332 867 730 1098"> <p>Cg Run Cg4170</p> <p>Find an Existing Value</p> <p>Run Control ID: <input type="text"/></p> <p> Advanced Search</p> <p>Add a New Value</p> </div> <p style="margin-left: 400px;"><-Initials</p> <ul style="list-style-type: none"> • If this is the first time you have used this process, click the Add a New Value link. <div data-bbox="332 1239 738 1449"> <p>Cg Run Cg4170</p> <p>Add a New Value</p> <p>Run Control ID: <input type="text"/></p> <p></p> <p>Find an Existing Value</p> </div> <ol style="list-style-type: none"> 1. Enter your initials in the Run Control ID block. 2. Click the  button.

Step	Action
4	<p>The Run page will display.</p>  <p>1. Enter the Department ID of the unit you want to generate forms for.</p> <ul style="list-style-type: none"> You can use the  button to lookup the Department ID if necessary. See Search Tips for help. Use the Search By Operational Facility Code (OPFAC) or Search Description Option to locate department IDs <p>Example search by OPFAC</p>  <p>Example search by description</p>  <p>2. Click the  button to begin processing.</p>

Step	Action
5	<p>The Process Scheduler Request page will display</p> 
6	<p>Select Web from the Process Type drop down menu.</p> 
7	<p>Select PDF from the Format drop down menu.</p>  <p>PDF = Adobe Acrobat</p>
8	<p>Click the OK button to launch the process and return to the Process Scheduler Request page.</p>
9	<p>Click the Process Monitor link in the upper right-hand corner of the Process Scheduler Request page.</p> 
10	<p>The Process Monitor page will display. Click the Refresh button periodically until the Run Status shows "Success" and the Details link is active. It could take some time for the status to change if you are running a large report or the system is heavily loaded.</p> 

Step	Action
11	<p>Click the Details link. The Process Detail Page will display. Click the View Log/Trace link.</p> <p>Process Detail</p> <p>Process</p> <p>Instance: 476108 Type: SQR Report Name: CGASQRPT Description: CGASQRPT</p> <p>Run Update Process</p> <p>Run Control ID: RAE <input type="radio"/> Hold Request Location: Server <input type="radio"/> Queue Request Server: PSUNX <input type="radio"/> Cancel Request Recurrence: <input checked="" type="radio"/> Delete Request <input type="radio"/> Restart Request</p> <p>Date/Time Actions</p> <p>Request Created On: 01/28/2003 15:14:55 EST Parameters Transfer Run Anytime After: 01/28/2003 15:07:59 EST Message Log Began Process At: 01/28/2003 15:15:01 EST Batch Timings Ended Process At: 01/28/2003 15:15:10 EST View Log/Trace</p> <p><input type="button" value="OK"/> <input type="button" value="Cancel"/></p>

Step	Action
12	<p>The Report Log Viewer page will open in a new window. Access your report by clicking the link with the report name and number in it (In the example below, cg4170dp_610219.PDF is the link to the report).</p>  <p>Note: You can also save the report to your local system at this time by clicking the right mouse button and selecting "Save Target As...". You will be prompted to select a location to save the file to.</p>
13	<p>Your report will open and display in the web browser. Use the buttons   in the Adobe Acrobat reader to save or print the report.</p>
14	Close the Report and Process Monitor windows
15	Select another activity from the Dependency and Emergency Data Activity Guide page.